

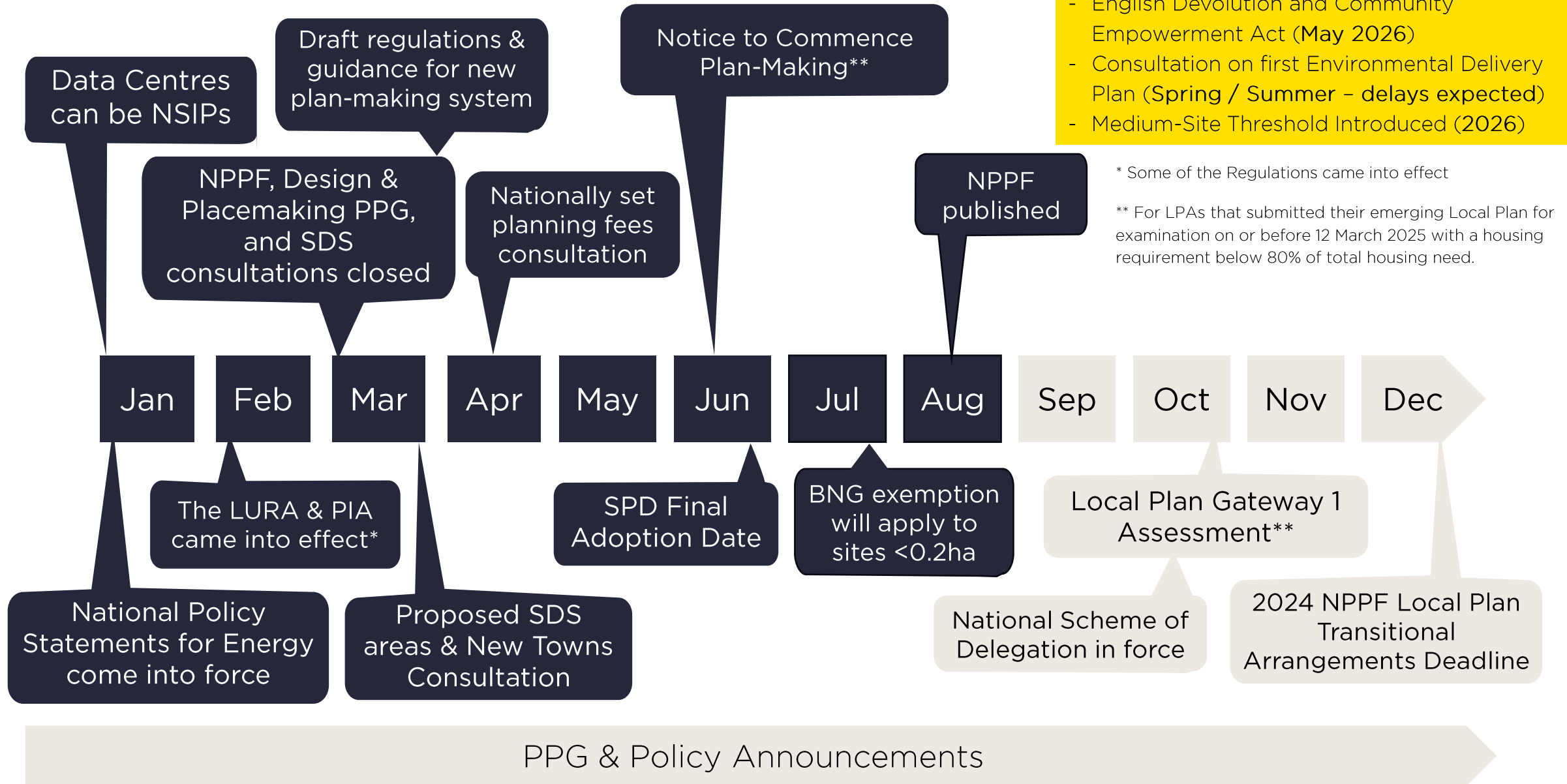
Planning: The State of Play

Emily Williams, Sept 2026

PREPARED FOR:

HBF Home
Builders
Federation

2026 - Planning Changes



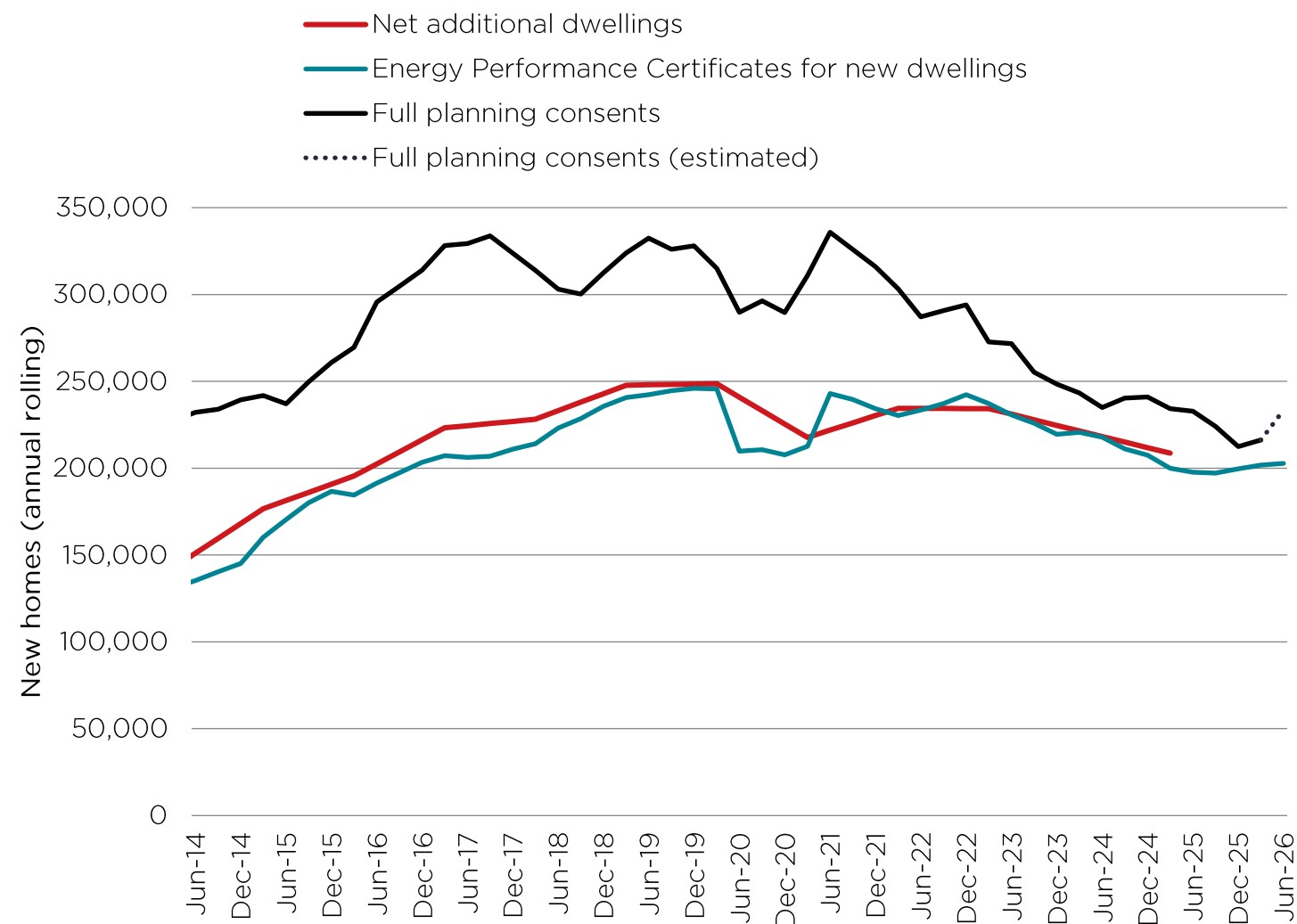
What Else....

- National Scheme of Delegation Draft Regs & Guidance published (March 2026)
- English Devolution and Community Empowerment Act (May 2026)
- Consultation on first Environmental Delivery Plan (Spring / Summer – delays expected)
- Medium-Site Threshold Introduced (2026)

* Some of the Regulations came into effect

** For LPAs that submitted their emerging Local Plan for examination on or before 12 March 2025 with a housing requirement below 80% of total housing need.

The landscape in 2026



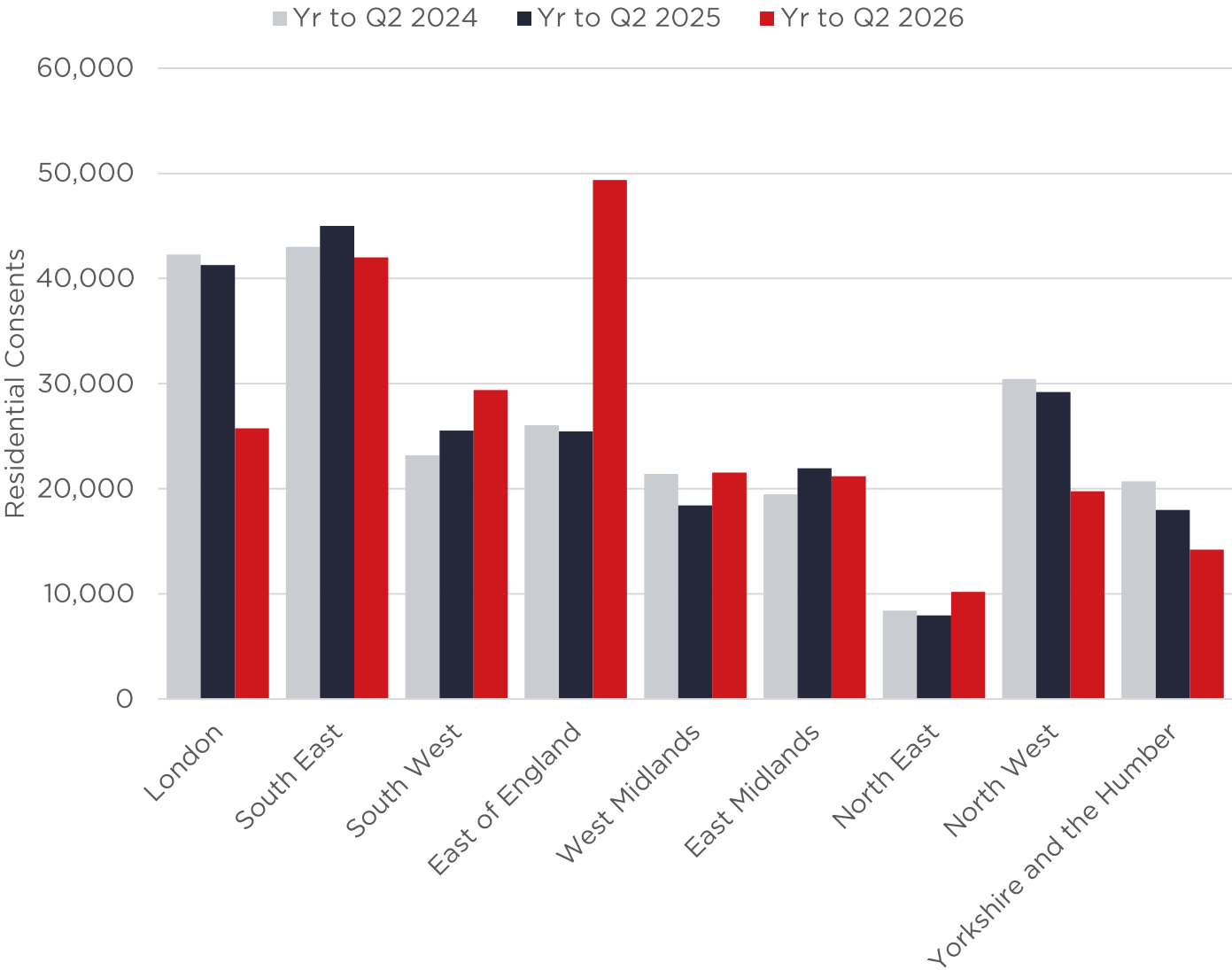
233,000

ANNUAL
RESIDENTIAL
PLANNING
CONSENTS

202,600

HOMES
COMPLETED
YEAR TO JUNE
2026

Regional variation



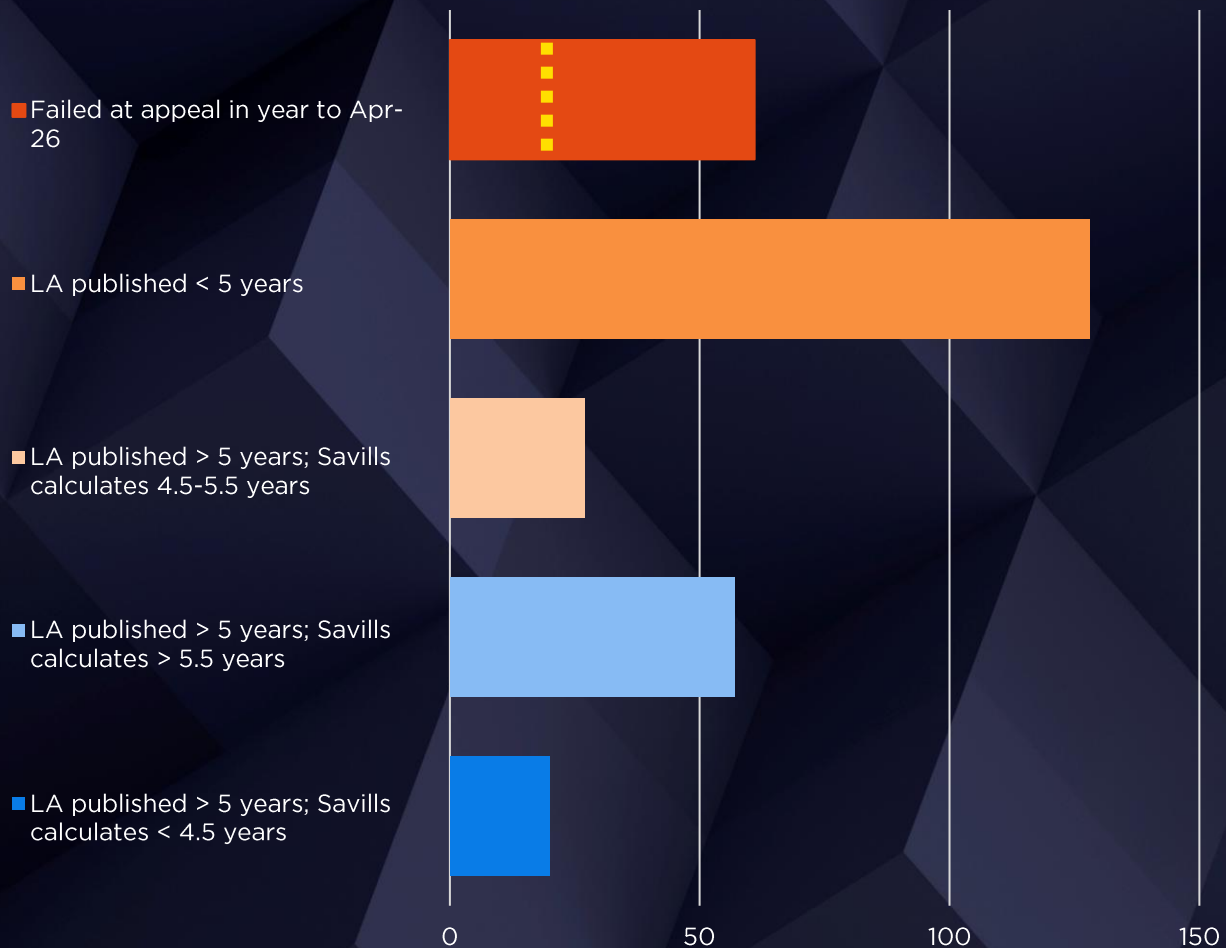
Source: HBF, Glenigan

-54%
LONDON V
2019 PEAK

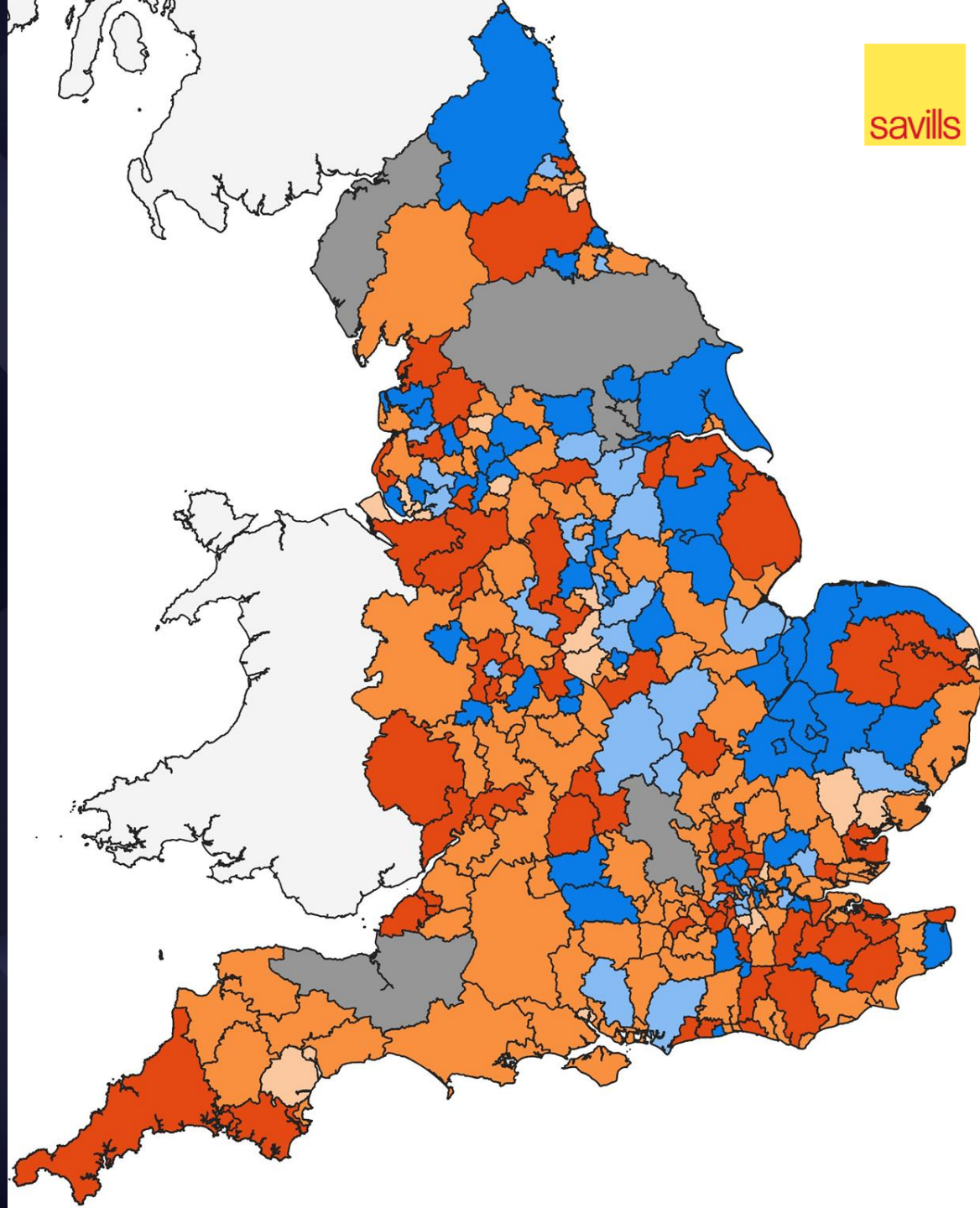
+20%
EAST OF
ENGLAND V
2019 PEAK

370,400 homes
annual requirement under
the Standard Method

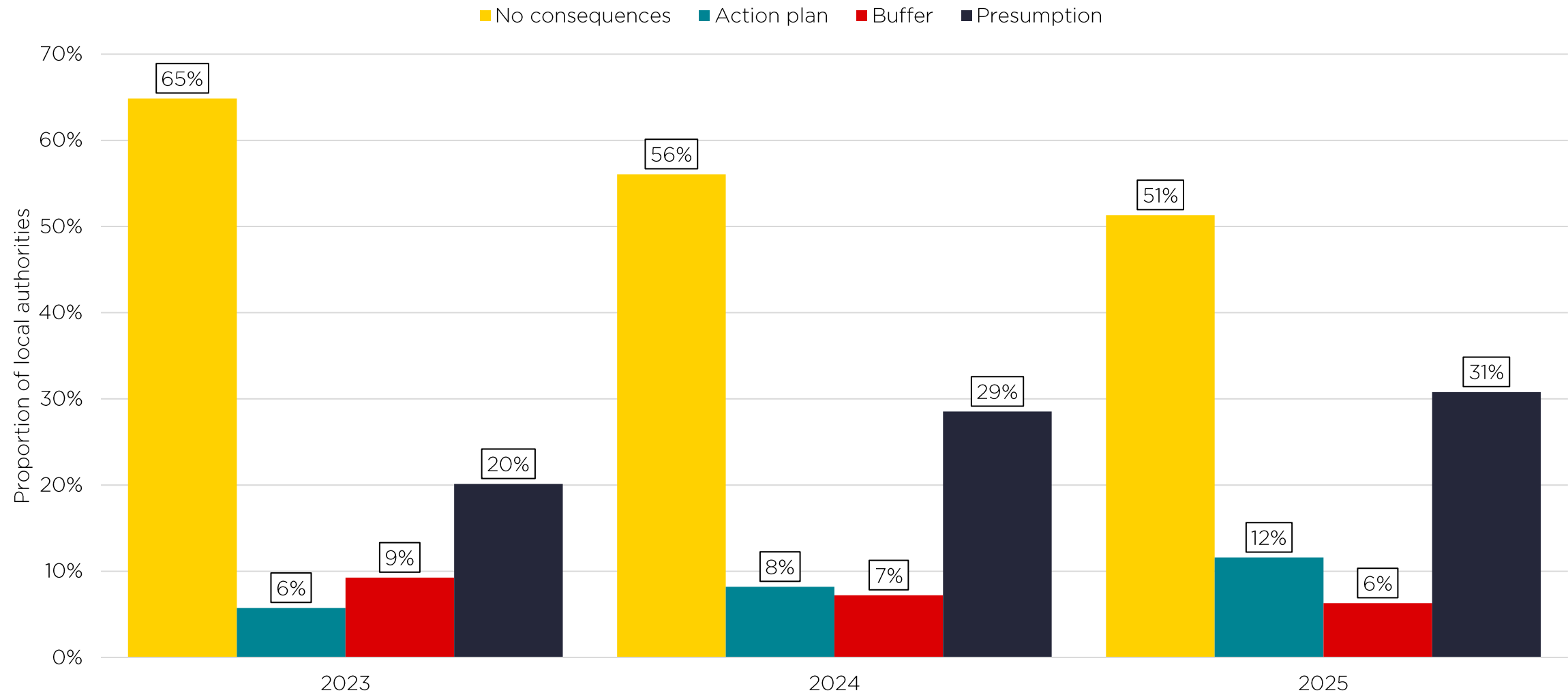
60% of LPAs do not have a 5 year housing land supply



Source: Savills Research



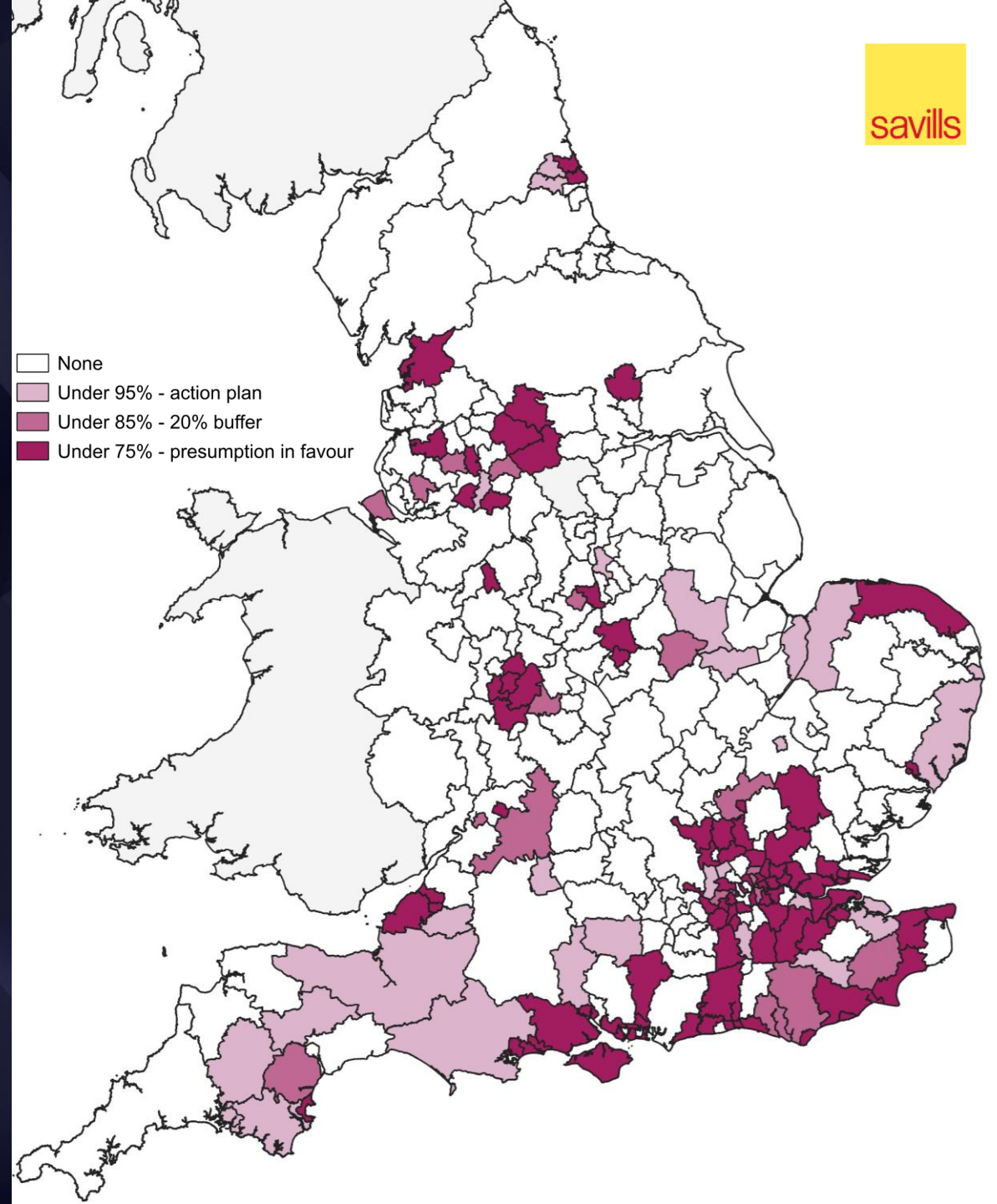
Housing Delivery Test ramping up



Source: MHCLG

With more pressure to come in 2026?

- None
- Under 95% - action plan
- Under 85% - 20% buffer
- Under 75% - presumption in favour

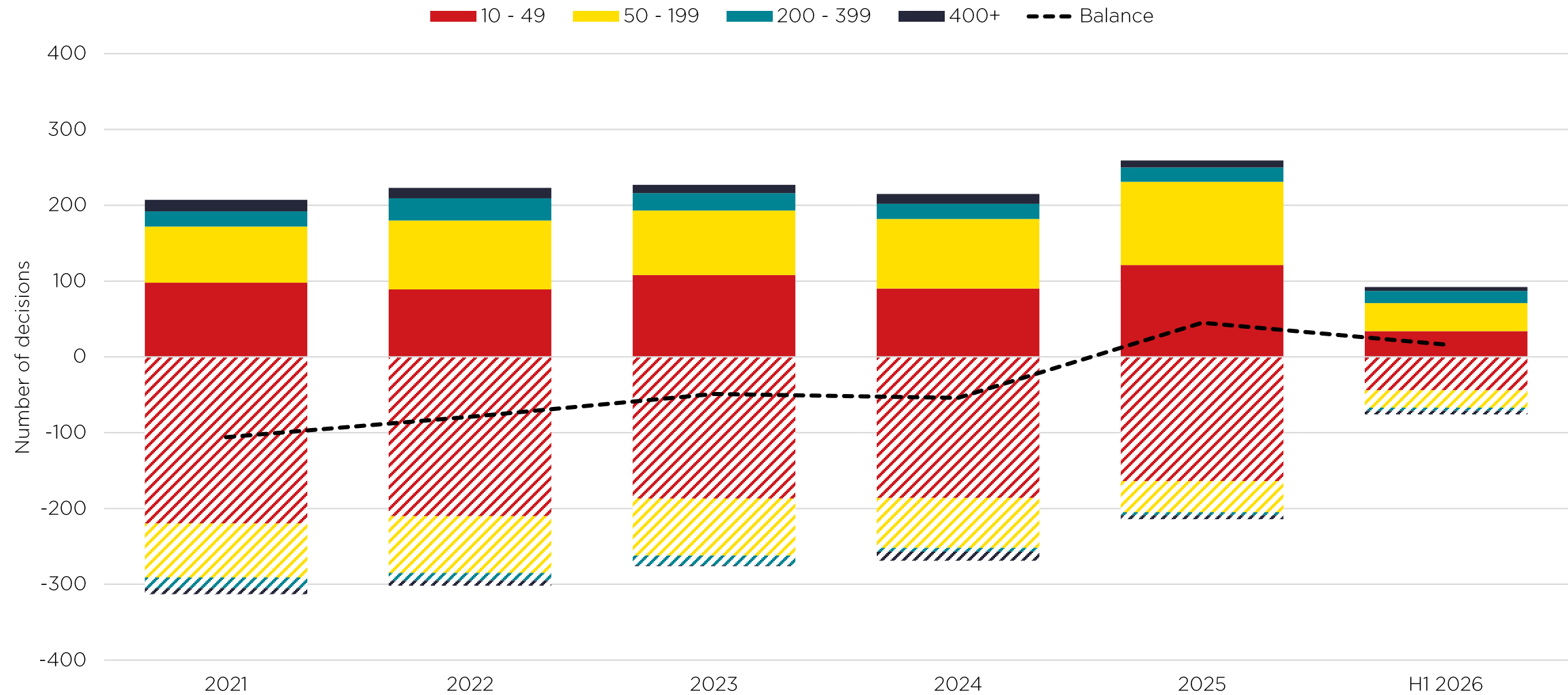


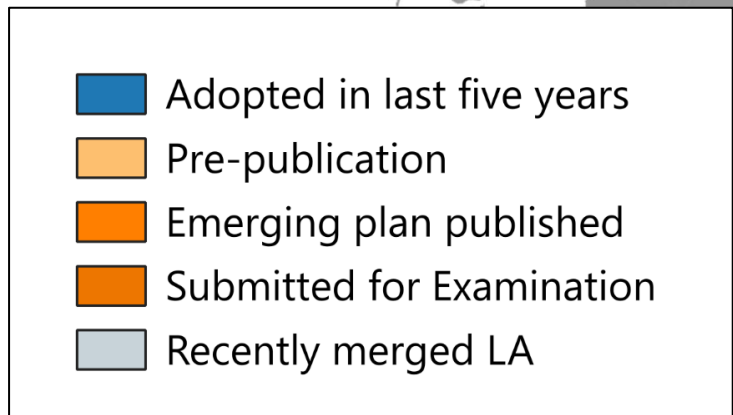
Presumption in favour of sustainable development
likely applies in

86%

of local planning authorities

Creating a productive route for appeals





92
UP TO DATE
PLANS

15
PLANS
ADOPTED SO
FAR IN 2026

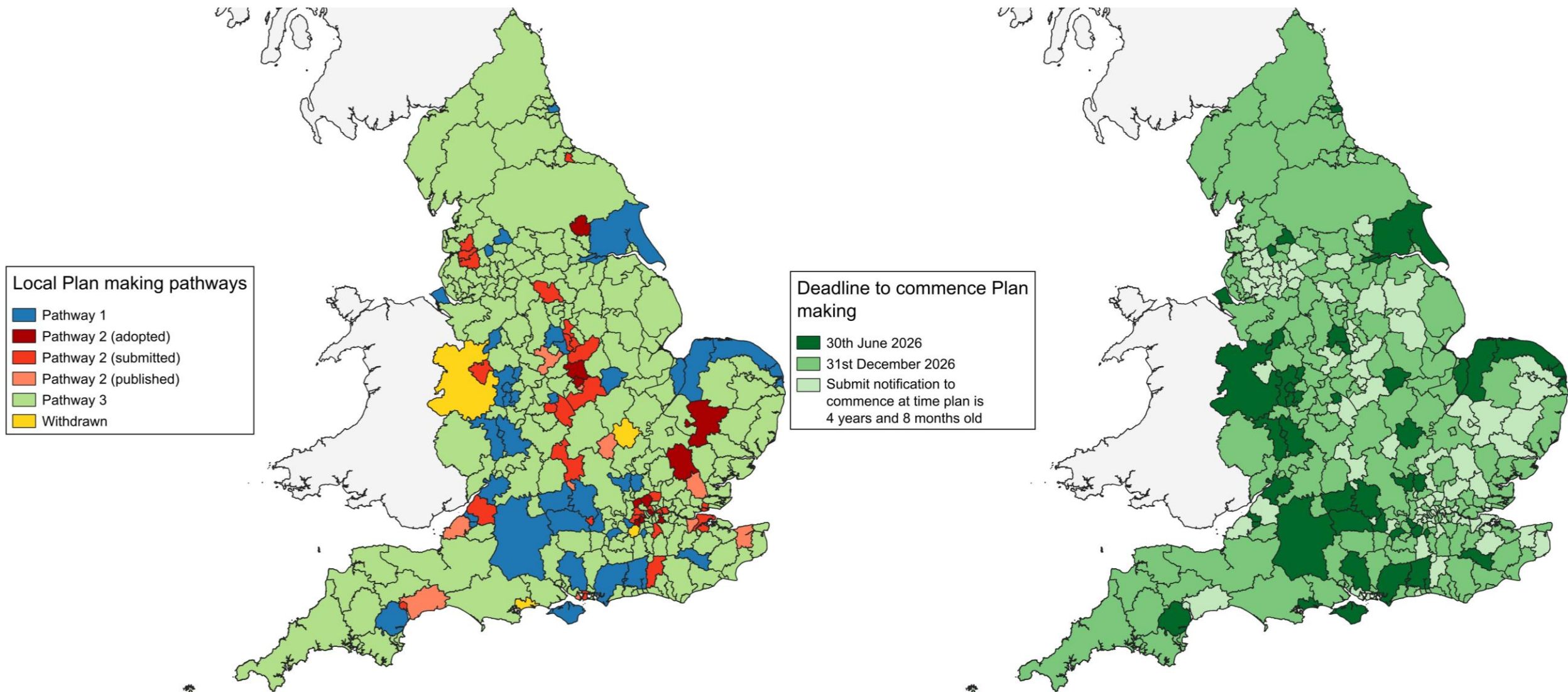
40
LPAS AT
EXAMINATION

Paths towards adopting new plans



	Pathway 1	Pathway 2	Pathway 3
Plan-making system	Legacy system	Legacy system	New system
Criteria	Emerging plan submitted before 12 th March 2025 Draft housing requirement less than 80% of standard method Local authority not covered by a spatial development strategy	Emerging plan submitted by the end of 2026	No plan submitted by end of 2026
Intention to commence plan-making under the new system	30 th June 2026	4 years and 8 months from adoption of legacy plan	Later of: End of 2026 4 years and 8 months from adoption of legacy plan
Other considerations	Date for intention to commence under new system varies for withdrawn plans. Local authorities will need to demonstrate a six-year land supply if the housing requirement is less than 80% of the standard method.	Date for intention to commence under new system varies for withdrawn plans.	
Number of LPAs on Pathway	39	39-49	208-218

Timescales to local plan adoptions



- 
- 01** Market headwinds mean the full potential of planning reform is yet to be felt.
- 02** But there are encouraging signs beginning to emerging in consent volumes
- 03** Higher residential targets have resulted in routes to a consent beyond the local plan process.
- 04** The window of opportunity remains open for now...
- 05** Local plan adoption expected to pick up the pace over the next 18 months.
- 06** Timing is crucial for opportunities in the c.200 LPAs on Pathway 3



Savills Research

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